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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

Happy Thursday from the Big Easy. I just arrived yesterday morning after spending the past few days at Future Proof Citywide in Miami Beach, where I moderated a panel about **how to show up in AI search results**. I'm looking forward to sharing more about what I learned at both, starting with how **data security and stress testing** can build AI trust, and the **steps firms should take on AI to avoid problems** with the SEC.

Also this week:

- Michael Kitces on **what makes advisors "unwell" at work**.
- The CFP Board debuted its new **$27 million awareness campaign**.
- Why advisors are still doubling down on winning **new clients through referrals**.

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TOP STORIES

TECHNOLOGY

How data security and stress-testing can build AI trust

At Future Proof Citywide, Azish Filabi of The American College of Financial Services, outlined the need for firms to be careful with client data and stress-test their infrastructure.

- **Monitoring employee AI use? Have an AI policy? The SEC will ask**

Panelists said advisory firms should take urgent steps to get ahead of regulatory examinations focusing on AI use.

- **What drives financial advisor well-being? Michael Kitces has answers**
  The latest study by The Kitces Report of advisors' well-being found five key drivers of their happiness with work — and many firms are falling short.
- **CFP Board launches new 'Dive' ad in $27M awareness campaign**
  The spring media buy for the CFP Board's ad push to increase public trust in and visibility of certified financial planners will cost $14.6 million and run to May 17.
- **Referrals still rule as advisors pour time into their brands**
  In this month's FACO, we asked how much time advisors spent on their firm's brands, what their marketing objectives were and their main sources of new clients.

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